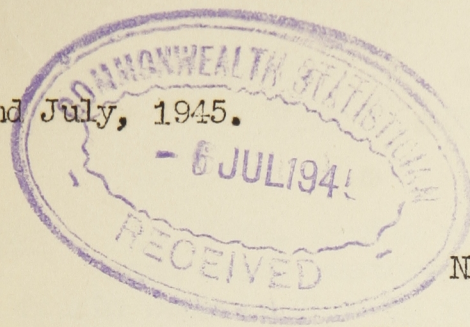


2nd July, 1945.

BS.1945/6B.



NEW SOUTH WALES.

BUSINESS STATISTICS - JUNE, 1945.

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SEASON.

Warm, gentle rain which fell in the drought areas of the Riverina and south western part of the State in the third week, was followed in the fourth week in June by further substantial gentle falls, transforming the outlook in that region. Throughout the Riverina these falls averaged upwards of $2\frac{1}{2}$ inches. Pastures are recovering, and given normal rainfall over the next few months, seasonal conditions will be fully restored. Elsewhere in the State rainfall in June was adequate to enhance the already favourable outlook.

Sheep are in demand for re-stocking and prices have risen. High prices for rabbit skins are fostering much needed trapping to check ravages of this pest.

WOOL.

Under the new Pastoral Award shearing rates have been raised 3s.9d. to 45s. per 100 and wages of shed hands, wool pressers and cooks have been increased, the first mentioned by 10s. to £6 a week (found). Striking shearers have agreed to accept the award and to resume work as from July 2, 1945.

Appraisements in Sydney for the 1944-45 season ended on June 29, 1945. Approximately 938,600 bales of wool were appraised, compared with 1,110,151 bales in 1943-44 and the record turnover of 1,395,701 bales in 1939-40. The decrease arises partly owing to the opening of additional appraisal centres, and in large measure as the result of the very severe drought just ended.

WHEAT.

Crops are progressing well in the northern and central sections of the wheat belt and with the advent of good rains, wheat sown on mainly dry seed beds should germinate and given following rains, should develop satisfactorily.

The Government will guarantee a price of 4s.3d. a bushel (bagged) as a first advance for wheat of the 1946-47 crop.

For non-quota wheat in No. 7 (1943-44) Pool a third advance (involving £500,000) of 7d. per bushel, making 3s.8½d. (bagged) at sidings, in all to date has been approved.

On non-quota wheat in No. 8 (1944-45) Pool a second advance, totalling £230,000 of 9d. a bus. is to be made, bringing the return to date to 3s.9d. a bus. bagged at sidings.

DAIRYING INDUSTRY.

Butter production in N.S.W. remains below the usual seasonally low level, but in April was 600,000 lb. greater this than last season, though only 58 per cent. of the average for that month in 1938-40.

Over the ten months ended April, 1945 the output of butter form factories was 17.4 m. lb. less than in July-Apr., 1943-44 and 35.7 m.lb. below the 1937-38 to 1939-40 average.

More cheese, also was made in April of this than last year but over the ten months ended April the quantity declined from 5.3 m.lb.s in 1943-44 to 4.0 m. lbs. this season. Flood damage in June may cause a temporary set back in the far North Coast, but generally the new season will open under mainly auspicious conditions.

BUTTER PRODUCED - N.S.W. FACTORIES.

Period	Average '37-8/'39-40	1940/41	1941/42	1942/43	1943/44	1944/45
	lbs. (m.)	lbs (m.)	lbs.(m.)	lbs.(m.)	lbs.(m)	lbs.(m.)
July-Dec.	54.2	44.1	39.2	47.4	44.8	35.1
January	12.3	14.5	6.7	13.0	12.8	8.0
February	11.8	12.8	8.3	10.2	10.2	6.8
March	11.4	11.7	10.1	8.6	8.4	8.3
April	10.0	8.7	8.6	6.1	5.2	5.8
Total, 10 months	99.7	91.7	72.9	85.3	81.4	64.0
Balance of year	14.2	12.0	12.2	8.5	6.5	...
Year	113.9	103.7	85.1	93.8	87.9	...

In every State except Tasmania less butter was made in July-April, 1944-45 than in those months of the preceding season, and cheese production declined in each major producing State except Victoria. Over the ten months the decreases in the Commonwealth were for butter 33 m.lb. and for cheese 3 m.lb., or of approximately 10½ per cent. and 4 per cent., respectively.

BUTTER AND CHEESE PRODUCED - AUSTRALIAN FACTORIES.

'000,000 lbs.

Period	Butter.			Cheese.		
	1942-43	1943-44	1944-45	1942-43	1943-44	1944-45
April	20.3	17.4	19.6	3.4	3.2	3.3
July-April	335.7	311.7	278.7	74.1	74.5	71.5

GENERAL. Barley. The guaranteed advances for barley of the 1945-46 crop for barley grain are 4s. for two row malting and 3s.6d. for six row malting barley, at growers' sidings.

Eggs. With a seasonal increase in production civilian deliveries of eggs have been increased from 50% to 75% of base quota. The priority scheme, assuring supplies to vulnerable groups is to end on 31st July, 1945. Late in June the Minister for Commerce and Agriculture stated that so far this season for eggs acquired by the Commonwealth £6.48 m. had been paid, which was £1.4 m. in excess of the previous record of 1943-44.

Tallow. Export values of tallow have risen recently (to £9.15s. a ton) and an equalisation pool has been formed to assure to all producers an equitable share in the increased price.

Lead and Zinc. Throughout the war the British Government purchased lead and zinc and concentrates from Australian producers at an adjustable contract price, varying according to production costs. The arrangement is to cease as from 9th August, 1945.

PART II FINANCE AND TRADE.

GENERAL. Flood Relief. The N.S.W. Government provided £35,000 for the relief of serious distress caused by the recent floods on the North Coast.

Unemployment and Sickness Benefit. The Commonwealth Unemployment and Sickness Benefits Act came into operation as from 1st July, 1945. Benefits, which apply to persons whose earnings have been interrupted through unemployment and temporary incapacity caused by sickness or accident, are at the rates of from 15s. to 20s. a week for juveniles and 25s. a week for adults, plus 20s. for a wife and 5s. a week for one child.

N.S.W. GOVERNMENT ACCOUNTS. During May, 1945 the excess of revenue over expenditure in the combined accounts increased by £850,000 compared with a corresponding increase of £1,113,000 in May, 1944.

Revenue and expenditure figures are affected by special transactions vide note to the appended table, but the net results in 1943-44 and 1944-45 are comparable. Over the eleven months ended May the excess of revenue over expenditure (£1.42 m.) was £320,000 greater this year than in 1943-44. Of the improvement, £260,000 accrued in the Consolidated Revenue Fund. In respect of business undertakings regressions of £160,000 in the Railways and £156,000 in the Road Transport and Traffic Funds were offset by improvements in result in Main Roads of £292,000, Sydney Harbour of £75,000 and in Tramway and Omnibus Accounts, of £6000.

NEW SOUTH WALES GOVERNMENT ACCOUNTS.

July to May.	Revenue + (£ mill.).				Expenditure + (£ mill.)				Excess of Revenue
	Consolidated Revenue	Bus. Undertggs. £	Main Roads	Total	Consolidated Revenue	Bus. Undertggs. £	Main Roads	Total	
1943-44	27.26	39.36	2.33	68.95	34.73	30.68	2.44	67.85	1.10
1944-45	31.56	36.81	2.56	70.93	38.77	28.36	2.38	69.51	1.42
Movement	(+) 4.30	(-) 2.55	(+) 0.23	(+) 1.98	(+) 4.04	(-) 2.32	(-) 0.06	(+) 1.66	(+) 0.32

+ Including in 1944-45 the receipt of £3.25 m. and the payment of £3.84 m. for retirement of Treasury bills (Vide B.S.1945/2A,p.4) and receipt of £639,000 for transfer of Garden Is. to the C'wealth.

£ Railways, Tramways and Buses, Road Transport and Traffic Fund, and Sydney Harbour.

RETAIL TRADE. With three more trading days the value of sales in a group of large stores in Sydney was 3 per cent. greater in April, 1945 than in April, 1944. In the three months ended April sales were much the same in value in 1944 and 1945 as in 1942. Allowing very roughly for changes in the level of prices the turnover of these stores appears to be something like 15 per cent. below that of 1939.

A marked increase in stocks has been shown latterly; total stocks averaged 14.4 per cent. higher in value in Feb.-April, 1945 than in the same months of 1944. Notable increases in April, 1945 compared with April, 1944 were in manchester, drapery and clothing (24.8%) - since reflected in lower coupon rating for certain clothing - in fancy goods (20.4%) and in books, stationery, etc. Notwithstanding an increase in sales of 29.2 per cent., stocks of furniture and hardware (including building materials) were 3.5 per cent. greater than in April, 1944.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage Increase (+) or Decrease (-) from corresponding period previous year.

Year.	Value of Sales.					Value of Stock.	
	Jan.	Feb.	Mar.	Apr.	Feb.-Apr.	Apr.	Feb.-Apr.
1941-42	(+) 5.5	(+) 3.4	(+) 25.9	(+) 25.6	(+) 18.3	(+) 8.7	(+) 12.8
1942-43	(-) 15.3	(-) 27.5	(-) 14.1	(-) 16.0	(-) 18.7	(-) 2.3	(-) 0.9
1943-44	(-) 10.0	(+) 1.6	(+) 10.4	(-) 8.8	(+) 0.5	(-) 3.3	(-) 3.8
1944-45	(+) 20.1	(+) 6.7	(-) 6.6	(+) 3.0	(+) 0.5	(+) 18.3	(+) 14.4

Decreases in April, 1945 compared with April, 1944 in sales of wearing apparel were contrary to the experience of other recent months, except in respect of boots and shoes. The increases shown in the following table for household piece goods and for furniture and hardware (including building materials) may be related to increased activity in house building.

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month of April.	Wearing Apparel				Household Piece Goods.	Furniture and Hardware.
	Dress Piece Goods.	Women's Wear.	Men's & Boys' Wear.	Boots and Shoes		
1942	(+) 82.1	(+) 31.3	(+) 31.3	(+) 46.8	(+) 24.7	(+) 1.0
1943	(-) 26.0	(-) 16.8	(-) 16.2	(-) 17.0	(-) 1.6	(-) 21.1
1944	(-) 1.8	(-) 5.0	(+) 2.5	(-) 6.6	(-) 23.4	(-) 19.8
1945	(-) 14.6	(-) 1.2	(-) 11.7	(-) 9.3	(+) 9.4	(+) 29.2

PART III INDUSTRY, TRANSPORT, ETC.

GENERAL. Manpower. Amending earlier decisions the Commonwealth Government has now announced that 64,000 men (additional to normal wastage of about 20,000 in the period) are to be released from the fighting services in the next six months, with at least 10,000 in July-August, and an additional 12,000 in each month, September to December. Release of 10,000 on occupational grounds irrespective of period of service has been directed. The remaining 54,000 will comprise long service men, ex-prisoners of war and surplus aircrew and trainees. The monthly intake of the services is to be reduced, of men from 2,800 to 2,000 a month and of women from 700 to 550 a month.

Technical Training. War Cabinet has approved of the expenditure of up to £1,331,000 (including £511,500 in N.S.W.) upon buildings, etc. to provide for technical training of ex-service personnel.

Control Relaxed. Prohibition upon the use without permission of copper has been removed in respect of use for certain essential civilian purposes.

EMPLOYMENT IN NEW SOUTH WALES. Total employment remained fairly steady in Feb., March and April, 1945. In the latter month there was a decrease of 1,000 (mainly females) in private payrolls - probably seasonal - and a gain of 400 (males + 600, females - 200) in Government employment.

Between April 1944 and 1945 total employment increased by 6,900, as a result of 7,500 males added and a loss of 600 females. The increase in males accrued as to 4,800 in private payrolls and as to 2,700 in Government employment. Private employers added 3,100 women and 3,700 women left Government employment. In all, private employees increased by 7,900 and 1,000 persons went off Government payrolls during the twelve months.

ESTIMATED SALARY AND WAGE EARNERS EMPLOYED IN N.S.W.

(Excludes Rural Workers and Household Domestics but includes Civil Construction Corps).

End of Month	MALES			FEMALES			TOTAL		
	Govt. (a)	Private	Total	Govt. (a)	Private	Total	Govt. (a)	Private	Total
	'000	'000	'000	'000	'000	'000	'000	'000	'000
1939-July	136.5	393.4	529.9	19.4	148.6	168.0	155.9	542.0	697.9
1941-Dec.	146.4	410.1	556.5	23.4	203.9	227.3	169.8	614.0	783.8
1943-April.	156.6	368.6	525.2	39.8	208.1	247.9	196.4	576.7	773.1
1944-Mar.	152.4	370.8	523.2	47.0	207.0	254.0	199.4	577.8	777.2
Apr.	151.6	369.8	521.4	46.8	205.1	251.9	198.4	574.9	773.3
1945-Mar.	153.7	374.5	528.2	43.3	209.3	252.6	197.0	583.8	780.8
Apr.	154.3	374.6	528.9	43.1	208.2	251.3	197.4	582.8	780.2

(a) Commonwealth, State, Local, and Allied.

The few significant changes in industrial groups in April, 1945 conformed to earlier trends. A further 1,000 women left factories and another 1,700 men were added in transport and communication.

In the twelve months ended April factory employment decreased by 10,300 (including 6,000 women); the building industry gained 1,500 men; 5,100 (mainly men) were added in transport and communication; retail trade gained 1,200 males and 1,800 females, and in professional and personal services there was an increase of 5,600 of which two in every three were females.

ESTIMATED TOTAL EMPLOYMENT IN MAIN INDUSTRIAL GROUPS IN NEW SOUTH WALES.

Month.	Factory		Mining & Quarrying		Building & Construction (a)		Transport & Communication		Retail Trade		Other Commerce and Finance		Professional & Personal Services (b)	
	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000
1939-July	158.8	59.3			Not available.									
1941-Dec.	213.2	81.8	25.8	.2	49.0	.7	81.8	8.4	41.2	44.3	42.6	19.2	52.3	58.2
1943-Apr.	219.1	93.8	23.9	.2	32.4	.7	80.3	11.6	29.2	39.3	33.9	21.1	44.2	61.7
1944-Mar.	219.6	94.8	24.7	.2	28.1	.7	81.9	13.6	28.3	37.1	34.5	20.4	44.9	65.5
Apr.	218.1	94.2	24.5	.2	27.5	.7	82.3	13.6	28.4	37.0	34.3	20.3	45.0	65.0
1945-Mar.	214.3	89.2	24.0	.2	29.0	.7	85.2	14.1	29.6	38.7	36.0	20.7	47.0	68.5
Apr.	213.8	88.2	24.0	.2	29.0	.7	86.9	14.1	29.6	39.8	35.6	20.4	46.9	68.5

(a) Including AWC projects

(b) Including Education, Health, Hotels, Restaurants and Professional and Personal Services (except private domestics).

BUILDING INDUSTRY.

PRIVATE BUILDING

PERMITS granted in Sydney and Suburbs in May, 1945 were valued at £235,000, including £168,000 for new buildings: each the greatest since January, 1942. The total included £161,000 for dwelling houses (new and alterations, etc.) compared with a monthly average for these of £33,000 in 1944.

HOUSES. Private permits granted in the metropolis covered 179 new houses in May, 1945, making 582 for Jan.-May, 1945. The trend is strongly upward, with private house building activity in May approximately one-third of that recorded in 1939-40. (In 1939-40, however, approximately 3,400 dwellings in flats were provided also).

New houses arranged for on Government account in N.S.W. in May, 1945 numbered 99 (of which 88 were in the metropolis). For the five months ended May the totals were 46 (41) in 1944 and 352 (216) in 1945.

NUMBER OF NEW HOUSES COVERED BY PRIVATE BUILDING PERMITS AND CONTRACTED FOR OR AUTHORISED ON GOVERNMENT ACCOUNT.

Year	PRIVATE (Metropolis)					GOVERNMENT (N.S.W.)					Total of Foregoing.	
	Av. per Month.	Mar.	Apr.	May.	Jan. May	Av. per Month	Mar.	Apr.	May.	Jan.- May.	May.	Jan-May
1939-40	480	421	648	587	2,473	2	2	2	589	2,475
1942-43	7	2	8	7	30	80	44	40	15	189	22	219
1943-44	12	18	13	23	76	15	1	41	...	46	23	122
1944-45	69	106	141	179	581	72	109	61	99	352	278	933

The target for Government house building has been far from fulfilled. Manpower allocations have been revised to accord the building industry a higher priority and a large part (21,000 has been suggested) of the 50,000 services releases directed for July-Dec., 1945 is to be applied to building and associated activities.

A new target of 24,000 houses has been set for Australia for the year 1945-46. In 1944-45 to mid-May, 1,034 houses had been completed and 1,990 under construction (with 400 nearly completed) by Government agencies. In 1944-45 the Directorate of War Organisation of Industry had granted approximately 6,850 permits for houses and about 4,000 houses under W.O.I. permit had been or would be completed.

GOVERNMENT BUILDING.

Works arranged for on Government account in N.S.W. in May, 1945 were of a value of £593,000 including £476,000 in the metropolis. This record figure included over £125,000 for housing which with extensive works for the Royal Navy, accounted for a large proportion of the total. These also were material factors in the increase in Government projects from £1.04 m. in Jan.-May, 1944 to £1.83 m. in Jan.-May, 1945.

TOTAL BUILDING.

The value of all Government building in N.S.W. and of private building permits in the metropolis in May, 1945 was £328,000, compared with £328,000 in May, 1944. The corresponding aggregate for the five months ended May was £2.78 m. this year compared with £1.53 m. last year. The monthly averages in Col. 6 below suggest a current level for all building activity rather more than 40 per cent. of the pre-war level.

VALUE OF PUBLIC AND PRIVATE BUILDING IN N.S.W.

Period	Metropolis.			Government.		Total Cols.1 and 5. (6)
	Private (1)	Government (2)	Total (3)	Country (4)	Total, N.S.W. (5)	
	Monthly average value in £ thousands.					
1940	977	74	1,051	223	297	1,274
1944	134	72	206	91	163	297
Jan.-May, 1944	118	142	230	66	208	326
Jan.-May, 1945	190	246	436	119	365	555
May, 1944	157	82	239	39	171	328
May, 1945	235	476	711	117	593	828

TRANSPORT.

STATE RAILWAYS.

Slightly fewer passengers and less goods and livestock were carried by the railways in May, 1945 than in May, 1944.

Operations in 1944-45 have been affected by widespread drought, a tapering off of transportation of war goods and the shortage of coal. Comparing the eleven months ended May of this and last year, passenger journeys increased by 1.3 per cent. and goods and livestock tonnage decreased by 3.8 per cent. Gross earnings were £2.63 m. less, and as working expenses (before meeting interest, etc.) decreased only £1.87 m., the surplus on working at £6.8 m. was £0.76 m. less for the period. It was, however, £1.97 m. greater than in July-May, 1938-39.

N.S.W. GOVERNMENT RAILWAYS.

Year	Month of May.			July to May.			
	Passenger Journeys	Goods and Livestock	Gross Earnings	Passenger Journeys	Goods and Livestock	Gross Earnings	Net Earnings ϕ
	millions	tons(000)	£000	millions	tons(000)	£000	£000
1938-39	15.6	1,478	1,757	171.9	13,986	17,562	4,832
1941-42	19.2	1,545	2,713	199.4	17,075	25,233	6,949
1942-43	21.1	1,578	2,924	216.9	17,983	31,255	8,420
1943-44	22.0	1,683	2,852	229.5	17,789	31,698	7,555
1944-45	21.6	1,522	2,746	232.5	17,117	29,067	6,798

ϕ Gross earnings less working expenses; available to pay interest, etc., on railway loan debt.

Electrification of the Sydney-Newcastle line is to be a first priority post-war work. Post war plans include also construction of an Eastern Suburbs railway and electrification of part of the Illawarra and Blue Mountains Lines.

GOVERNMENT TRAMS
AND 'BUSES.

More passengers were carried, but working expenses increased a little more than did gross earnings in May, 1945 compared with May, 1944.

In the eleven months ended May, 1945 passenger journeys (499.3 million) numbered 26.6 m. more, but because the increase in gross earnings of £68,000 fell short of that in working expenses (exclusive of depreciation) of £82,000, net earnings (£526,000) were £14,000 less than in July-May, 1943-44.

N.S.W. GOVERNMENT TRAMS AND 'BUSES - SYDNEY AND NEWCASTLE.

Year	Month of May			July to May.			
	Passenger Journeys	Gross Earnings	Working Expenses (a)	Passenger Journeys	Gross Earnings	Working Expenses (a)	Net Earnings. (b)
	millions	£000	£000	millions	£000	£000	£000
1939-40	31.5	370	301	347.9	4,110	3,434	676
1941-42	42.1	477	403	442.3	4,996	4,185	811
1942-43	42.6	473	413	461.7	5,135	4,404	731
1943-44	43.6	486	441	472.7	5,245	4,705	540
1944-45	45.9	490	445	499.3	5,313	4,787	526

(a) Excluding depreciation.

(b) Gross earnings less working expenses: available to pay interest, depreciation etc. on loan debt.

MOTOR VEHICLES.

In May, 1945, as in recent months, relatively few new motor vehicles were registered, and of these the majority were commercial vehicles.

The number of all cars registered decreased by 46,600 between August, 1939 and July, 1942 and then began increasing again, but in May, 1945 the number was still 31,200 below the wartime peak. Lorries and vans, however decreased by 6,700 up to July, 1942 and in May, 1945 were 4,900 more numerous than at the outbreak of the war.

MOTOR VEHICLES REGISTERED IN N.S.W.

Type of vehicle.	New Registrations.			All registered motor vehicles.				
				Number at end of -		Increase in		
	May, 1944	April, 1945.	May, 1945.	Aug. 1939 (a)	July, 1942 (b)	May, 1945.	Jan.-May, 1944.	Jan.-May, 1945.
	Average Weekly No.			000	000	000		
Cars	4	5	7	216.6	170.0	185.4	2,755	1,017
Lorries and Vans	84	42	38	77.6	70.9	82.5	2,460	2,033
All vehicles	88	47	45	329.2	267.4	297.6	6,185	4,074

(a) Pre-war peak. (b) Lowest war-time number of cars.

The Commonwealth Government has under consideration proposals from six companies to manufacture motor vehicles in Australia. The latest proposal is by Standard Motor Coy. Ltd., Coventry in conjunction with Richards Industries Ltd., Adelaide.

Press references indicate the likelihood of an increase (perhaps 20%) in the petrol ration to offset loss of mileage arising from use of the lower grade of petrol now being distributed. The possibility of an increased ration for retail delivery services is also under review.

GAS AND ELECTRICITY.

In each month of this year the consumption of gas and electricity in Sydney and suburbs has been appreciably greater than in the corresponding month of last year. Up till March the absence of daylight saving (operated in 1943-44) may have been a contributing factor, and the gradual move toward normal lighting may affect comparisons for April and May.

Major gas and electricity undertakings are operating on hand-to-mouth supplies of coal and the rationing of electricity was narrowly averted during June. Until coal stocks are built up the supply of light and power will remain precarious.

INDEX OF CONSUMPTION OF GAS AND ELECTRICITY - SYDNEY.

Period.	Average 1929-31.	1939	1942	1943	1944	1945.
Year	100	131	154	167	170	-
March	100	130	146	164	165	171
April	100	125	147	164	162	172
May	100	128	144	166	172	178

As a post-war project the establishment of a large power station at Wangi Wangi, Lake Macquarie is under consideration.